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SEAFOOD SECTOR -- EQUIPMENT REQUIREMENTS AND SIGNIFI-
CANCE OF FISH EXPO FOR U.S. SUPPLIERS

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SUBJ: RMRO'S INTERIM MARKET REPORT ON AUSTRALIAN FISHING-SEAFOOD
SECTOR
EQUIPMENT REQUIREMENTS AND SIGNIFICANCE OF FISH EXPO
FOR U.S. SUPPLIERS

SUMMARY: TO DATE, PERSONAL INTERVIEWS WITH SOME 50 MEMBERS OF
AUSTRALIA'S
SEAFOOD/FISHING SECTOR SUGGEST THERE ARE LIMITED, BUT IMMEDIATE,
OPPORTUNITIES FOR SPECIALIZED, AMERICAN-SOURCE ELECTRONIC EQUIP-
MENT, COMMERICAL FISHING GEAR FOR PRAWNING AND DEEP SEA TRAWLING,
AND A NARROW RANGE OF SOPHISTICATED/LABOR SAVING MACHINERY FOR SEAFOOD
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PROCESSING. THE ENTIRE MARKET, ALL EQUIPMENT COMPONENTS INCLUDED,
IS COMPARATIVELY SMALL BY WORLD STANDARDS --INDUSTRY ESTIMATES ARE
IN THE NEIGHBORHOOD OF \$30 MILLION ANNUALLY, INCLUDING VESSELS,
BUT THIS MAY REACH \$40 MILLION BY 1982.
BEING MINDFUL OF THE FACT THAT NO ONE IN THE INDUSTRY IS QUITE
CERTAIN WHAT THE COMERCIAL/ECONOMIC RAMIFICATIONS OF AUSTRALIA'S

200 MILE LIMIT WILL BE, AMERICAN SUPPLIERS, ESPECIALLY NEW-TO-MARKET IN THE AFOREMENTIONED PRODUCT CATEGORIES, SHOULD BE ALERTED TO THE FACT THAT THEY CURRENTLY HAVE A REAL OPPORTUNITY TO MAKE INROADS INTO JAPANESE DOMINANCE OF THIS MARKET. TO ACCOMPLISH SUCH PENETRATION, HOWEVER, AMERICAN SUPPLIERS IN QUESTION MUST BEC : (A) PREPARED TO DEMONSTRATE THE ADVANTAGES OF THEIR PROEUCT TO LOCAL END-USERS, ESPECIALLY THOSE FISHERMEN WHO CAN OBTAIN FINANCING, AND (B) WILLING TO FOLLOW-UP THIS EFFORT WITH SELECTION OF AGRESSIVE LOCAL REPRESENTATION WHICH CAN SERVICE EQUIPMENT.

RECOMMENDATION: IN VIEW OF THE FOREGOING, A POSSIBLE POINT OF DEPARTURE IN PROVIDING BENEFICIAL PROMOTIONAL ASSISTANCE TO INTERESTED AMERICAN SUPPLIERS COULD BE AN EXPANDED BIC PRESENCE AT THE FORTHCOMING FISH EXPO-79, SCHEDULED FOR PERTH, DURING AUG 26-29

1979. THIS USDOC ASSISTANCE COULD, IN TURN, BE LINKED TO A MISSION-TEAM COMPOSED OF OLD-TO-MARKET SUPPLIERS PLANNING TO EXHIBIT AT FISHEXPO AND NEW-TO-MARKETS WITH SAMPLES AND AUDIOVISUALS. IMMEDIATEL

PRIOR TO FISH EXPO, THE TEAM WOULD STAGE TECHNICAL DEMONSTRATIONS FOR AND HOLD MEETINGS WITH FISHERMEN AND POTENTIAL REPRESENTATIVES IN QUEENSLAND AND THE EDEN-LAKES ENTRANCE COMPLEX OF SOUTHEASTERN AUSTRALIA. UNCLASSIFIED

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MARKET CAPSULE: COMMONWEALTH AND STATE OFFICIALS, EQUIPMENT SUPPLIERS AND REPRESENTATIVES, FLEET OWNERS AND SEAFOOD PROCESSORS, INDIVIDUAL FISHERMEN AND/OR THEIR COOPERATIVES ARE GENERALLY AGREED THAT OFFICIAL DECLARATION OF AUSTRALIA'S 200 MILE FISHING ZONE (POSSIBLY BEFORE THE END OF CALENDAR YEAR 1978.) WILL NOT MARKEDLY ALTER THE COUNTRY'S COMPARATIVELY SMALL FISHING-FISH PROCESSING SECTOR OVER NIGHT. A MINIMUM OF TWO YEARS "TEST FISHING" BY INDIVIDUAL AUSTRALIAN FLEET OWNERS AND/OR AUSTRALIAN-FOREIGN JOINT VENTURES WILL MOST LIKELY BE REQUIRED BEFORE ANY CONFIDENT DETERMINATION CAN BE MADE CONCERNING THE COMMERICA VIABILITY OF AUSTRALIA'S FISHING GROUNDS, ESPECIALLY THE WETFISH POTENTIAL. ACCORDINGLY, LOCAL PROCESSORS ARE NOT EXPECTED TO UNDERTAKE SIGNIFICANT EXPANSION BEFORE 1980; THEIR EXISTING FACILITIES ALREADY HAVE EXCESS CAPACITY AND THE MAJOR CONERN AT PRESENT IS INSUFFICIENT CATCH. EQUALLY IMPORTANT, HOWEVER, IS THE FACT THAT INTEREST IN EXPLORING/EXPLOITING THE POTENTIAL OF AUSTRALIA'S 200 MILE ZONE (AND BEYOND), ACCOMPANIED BY FURTHER DEVELOPMENT OF THE LOCAL PRAWNING INDUSTRY -- FROM NORTH WESTERN AUSTRALIAN WATERS OVER TO NORTH QUEENSLAND -- HAVE RESULTED IN A GREAT DEAL OF PLANNING AND ACTIVITY DESIGNED TO "TOOL UP" WITH LARGER VESSELS

(100' TO 150') AND MORE SOPHISTICATED GEAR FOR WETFISH EXPLORATION, AND A CORRESPONDING INTEREST IN BETTER EQUIPPED, LARGER PRAWN TRAWLERS (65 TO 80'). ACCOMPANING THIS INDUSTRY MOVEMENT IS A CONTINUING INTEREST BY MAJOR SEAFOOD PROCESSING FIRMS IN THE DEVELOPMENT OF LAOR SAVING EQUIPMENT WHICH COULD MAKE AUSTRALIAN WETFISH PRODUCTS SOMEWHAT MORE COMPETITIVE FROM A COST STANDPOINT. THE CRAYFISH(LOBSTER) SECTOR IS RELATIVELY STABLE, BUT BOAT REPLACEMENT (30' TO 40') AVERAGES SOME 35 ANNUALLY.

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THE CANNING SECTOR HAS EXCESS CAPACITY. UNTIL THIS SITUATION IS REMEDIED BY INCREASED CATCH AND IDENTIFICATION OF VIABLE MARKETS -- THE LATTER IS, IN REALITY, A QUESTION OF REDUCING PRODUCTION/ LABOR COSTS, THERE IS LITTLE ADDITIONAL OPPORTUNITY FOR U.S. SUPPLIERS BEFORE 1980. FIRMS LIKE CANCO AND AMERICA CAN ARE ALREADY HERE.

SALES OPPORTUNITIES: EQUIPMENT MOST COMMONLY IDENTIFIED AS HAVING NEAR TERM SALES POTENTIAL FOR AMERICAN SUPPLIERS IS OUTLINED IN THE FOLLOWING LISTING; NAMES OF SOME OF OUR SUPPLIERS ALREADY PRESENT IN THE MARKET AND/OR WHOSE PRODUCT IS CURRENTLY OF INTEREST TO FISHERMEN AND OTHER POTENTIAL END-USERS ARE INDICATED PARENTHETICALLY. IN REVIEWING THE FOLLOWING PRODUCT LIST, HOWEVER, AMERICAN SUPPLIERS SHOULD CONSIDER THE FACT THAT AUSTRALIAN FISHERMEN, IN ADDITION TO BEING RACONTEURS, ARE ACCOMPLISHED READERS OF AMERICAN FISHING JOURNALS; THEY ENJOY LEARNING OF THE LATEST U.S. DEVELOPMENTS IN THE EQUIPMENT FIELD. NONETHELESS, THE SAME FISHERMEN ARE CONSERVATIVE IN THEIR BUYING HABITS AND RELUCTANT TO CHANGE BRANDS UNLESS A NEW ONE CAN BE DEMONSTRATED TO BE MORE EFFICIENT IN IMPROVING THEIR CATCH. PRICE IS NOT ALWAYS THE MAJOR DETERMINANT IN SELLING EQUIPMENT, BUT QUALITY OF PRODUCT, FACILITY IN MAKING REPAIRS,

AND ACCESSIBILITY TO SPARE PARTS ARE ESSENTIAL. SIMILARLY, WITHOUT A THOROUGH TRIAL OR DEMONSTRATION OF NEW PROEUCT, THERE IS LITTLE CHANCE OF MAKING A SALE WHICH WILL RESULT IN UNCLASSIFIED

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FISHERMEN SPREADING THE WORD ABOUT THE MERITS OF A NEW PRODUCT. TO DATE, THE JAPANESE HAVE RECOGNIZED THIS SITUATION AND THEIR SURGE IN MARKET PENETRATION CAN BE CHARTED ACCORDINGLY.

ELECTRONIC EQUIPMENT: SATELLITE NAVIGATION (MAGNAVOX); SONAR (WESMAR); AUTOMATIC DIRECTION FINDERS (MAGNUS COMMUNICATORS CORP, CHICAGO, ILL); AUTOMATIC SCANNING RADIOS (ELECTRA CO, DIV OF MASCO CORP, INDIANA); RADIO MONITORS AND VOICE SCRAMBLEJRS (ELECTRIC CO, KING RADIO CO, OLATHE, KAN); ECHO SOUNDERS WITH COLOR; WATER TEMPERATURE AND DIGITAL RECORDERS (DYTEK LABS INC, BOHEMIA, NY); AUTO PILOTS (WESMAR, BENDIX).

FISHING GEAR: ELECTRONICALLY OPERATED AND HAND/GEAR-OPERATED TUNA FISHING POLES (AUTO POLE); COMPASSES (ACQUAMETER); BLOCKS, ESPECIALLY PURSE SEINER TYPE (BCM, BROWNSVILLE, TEXAS, MARCO, MCKISSIC); HYDRAULIC WINCHES (MARCO); NETTING MATERIAL AND COMPOUNDS ROPE (PURITAN MILLS INC, PILOT MT, NC); SPECIALITY WIRE AND CHAIN (UNIVERSAL WIRE); SMALL DWSALINATORS FOR PRAWN TRAWLERS IN THE GULF OF CARPENTARIA (WILCOX); FISH AND PRAWN SUCKERS (AMRCO).

PROCESSING: SMALL CALIBER AUTOMATIC PRAWN DEHEADERS, GRADERS, PEELERS (LAITHRAM, SORT RITE, INC, HARLIGNEN TEX, TRI-PAK); GUTTING AND CLEANING EQUIPMENT---PRIMARILY FOR WETFISH (GREGGOR-JOHNSON ASSOCIATES, HIGHLAND PARK, ILL, CRAB AND TRASH SEPARATORS; CONVEYORS (INTRALUX); PLATE ANS NAP FREEZERS FOR PRAWN TRAWLERS AND WETFISH (THEMO KING); SMALL MICROWAVE OVENS, BATTER AND BREADING MACHINES--PRIMARILY FOR WETFISH AND DEMAND EXPECTED TO BE LIMITED UNTIL 1980'S.

NOTE: SEVERAL OF THE MAJOR FLEET OWNERS HAVE SUGGESTED THAT A FIBER GLASS PURSE SEINER, FULLY EQUIPPED WITH ELECTRONIC UNCLASSIFIED

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AND COMPANION FISHING GEAR, WOULD BE AN EXCELLENT ITEM TO DISPLAY AT FISH EXPO-79. ALTHOUGH AUSTRALIAN REGULATIONS PROHIBIT THE IMPORTATION OF FISHING VESSELS, UNLESS SHOWN TO BE LESS EXPENSIVE THAN LOCAL MANUFACTURE (ALLOWANCES INCLUDED), THIS COULD BE AN AREA OF LONG TERM INTEREST FOR U.S. SUPPLIERS.

FISH EXPO - 79, PROMOTION POTENTIAL: THE AUSTRALIAN FISHING INDUSTRY COUNCIL (AFIC) IS HANDLING PREPARATION FOR FISH EXPO-79. THE AFIC CONSIDERS THAT TRADE ATTENDANCE DURING THE FOUR-DAY EVENT WILL BE, AT MINIMUM, 3,000, APPROX 600 OF WHOM WILL ALSO BE REGISTRANTS AT A COMPANION SEMINAR REVIEWING THE POTENTIAL RAMIFICATIONS OF AUSTRALIA'S 200 MILE FISHING ZONE. THIS SUBJECT IS ON THE MIND OF ALMOST EVERY FISHERMAN INTERVIEWED AND, CONSEQUENTLY, MANY INDICATED THEY WOULD COME TO THE EVENT TO LEARN FIRST HAND WHAT MAY BE IN STORE FOR THE INDUSTRY. (THERE ARE AN ESTIMATED 17,000 FISHERMEN IN AUSTRALIA). NOTE: THE AUG-SEPT PERIOD IN AUSTRALIA IS TRADITIONALLY CONSIDERED TO BE A SLACK OR DOWN PERIOD, WHEN MOST FISHERMEN ARE "OFF DUTY" AND/OR ARE REFITTING.

PROVIDED LOCAL FAIR AUTHORITIES ARE CORRECT IN THEIR ATTENDANCE PROJECTIONS, INCLUDING THEIRS. RELIEF THAT 70% OF THE TRADE ATTENDING WILL ORIGINATE FROM OUTSIDE WESTERN AUSTRALIA, IT WILL INDEED BE THE MOST CONCENTRATED GATHERING OF AUSTRALIA'S FISHING/SEAFOOD SECTOR TO DATE, ESPECIALLY FROM A TRADE STANDPOINT. MOST OF THOSE INTERVIEWED DURING RMRO MARKET RESEARCH, AND WHO HAD PREVIOUSLY ATTENDED THE FIRST FISH EXPO IN MELBOURNE, IN 1976, SPOKE FAVORABLY OF THE EARLIER EVENT AND WERE MAKING PLANS FOR PARTICIPATING AT PERTH. THERE WILL PROBABLY BE 75 COMMERCIAL EXHIBITS AT FISH EXPO-79, WITH SPACE GOING FOR A\$40 PER SQUARE METER. FAIR AUTHORITIES INDICATED THEY WERE FLEXIBLE ON THE PRICE OF SPACE WHERE U.S. PARTICIPATION MIGHT BE CONCERNED.

AT PRESENT, THERE ARE NO STRICTLY INTERNATIONAL OR FOREIGN PAVILIONS
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ASSURED FOR FISH EXPO, ALTHOUGH FAIR AUTHORITIES ARE STILL NEGOTIATING WITH THE UK, JAPAN, NEW ZEALAND, GERMANY AND ITALY. THE DEADLINE FOR THEIR PURCHASING OF SPACE HAS BEEN EXTENDED (UNOFFICIALLY) TO DEC 1978. WHETHER OR NOT SOME OR ALL OF THE AFOREMENTIONED COUNTRIES WILL HAVE SEPARATE PAVILIONS IS DOUBTFUL, BUT THEIR EQUIPMENT WILL DEFINITELY BE ON DISPLAY THROUGH LOCAL REPS.

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FROM A STRICTLY PRACTICAL STANDPOINT, A USDOC ATTEMPT TO PROCURE A FULL-SCALE OFF-SITE FOR FISH EXPO, WOULD BE DIFFICULT. THE EQUIPMENT-SUPPLIER UNIVERSE, WILLING TO PAY IMC FEES, IS RELATIVELY SMALL AND THE FACT THAT SOME PROMINENT AMERICAN SUPPLIERS ARE ALREADY REPRESENTED HERE WOULD SEEM TO INDICATE THEIR LOCAL REPS WILL BE DISPLAYING THE U.S. EQUIPMENT WITH OTHER LINES. AN EXCEPTION HERE MIGHT BE CATERPILLAR, BUT THEN IT HAS ALREADY STAKED OUT A MAJOR SHARE OF THE DIESEL ENGINE MARKET AND IS NOT ANTICIPATING INCREMENTAL SALES.

FROM A MARKETING STANDPOINT HOWEVER, AND THINKING IN TERMS OF BOTH NTM'S AND OTM'S, THE EXHIBITION WOULD APPEAR TO BE EXCELLENT IN TERMS OF ITS VERTICALITY AND PROFILE. IT SHOULD ATTRACT EVERY CONCEIVABLE AUSTRALIAN EQUIPMENT SUPPLIER (OF ANY CONSEQUENCE) IN THE FISHING/SEAFOOD SECTOR. CONSEQUENTLY, THE U.S. MIGHT BE WELL ADVISED TO CONSIDER APPROACHING THE EXHIBITION IN A LESS TRADITIONAL MANNER.

RECOMMENDATION: TO ALLOW FOR EQUIPMENT DEMONSTRATION, APPOINTMENT OF SUITABLE AGENTS, AND TO PROVIDE U.S. SUPPLIERS WITH AN OPPORTUNITY TO ACTUALLY DISCUSS THE FISHERMEN'S PROBLEMS WITH THEM, THE RMRO SUGGESTS THAT CANBERRA AND USDOC CONSIDER THE FOLLOWING PROPOSAL: (1) HAVE USDOC ATTEMPT TO PROCURE AN 8 TO 10 MAN TEAM OF EQUIPMENT SUPPLIERS HEADED BY A PROMINENT OFFICIAL FROM THE U.S. FISHING SECTOR, WHO IS ALSO CONVERSANT WITH UNCLASSIFIED

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AMERICA'S EXPERIENCES VIS-A-VIS THE 200 MILE LIMIT. (2) SEND THE TEAM FIRST TO QUEENSLAND AND THEN T THE EDEN-LAKES ENTRANCE REGION OF SOUTHEASTERN AUSTRALIA TO DEMONSTRATE PRODUCT TO FISHERMEN AND AGENTS ALIKE. (NTM'S WOULD BE EXPECTED TO BRING EQUIPMENT SAMPLES AND MOVIES/SLIDES, WHILE OTM'S WOULD ALREADY HAVE SOME EQUIPMENT IN THE FIELD). NOTE: THE TWO REGIONS SUGGESTED HERE CONTAIN PROBABLY THE LARGEST CONCENTRATION OF FISHERMEN AND COOPERATIVES IN AUSTRALIA. (3) IMMEDIATELY AFTER THE TWO (35 TO 5-DAY) STOPS, THE TEAM WOULD PROCEED TO FISH EXPO AND SET UP THEIR SAMPLES AND AUDIO VISUALS AT AN EXPANDED BIC.

WHETHER OTM'S WOULD WANT TO HAVE A PRESENCE IN THE BIC OR WOULD PLAN TO KEEP THEIR ENTIRE LINE ON DISPLAY AT THEIR REPS' STAND, WOULD NOT BE CRUCIAL, PROVIDED THE NTM'S WERE GIVEN EVERY OPPORTUNITY TO DISPLAY AND DEMONSTRATE THEIR PRODUCT. (4) THE U.S. TEAM LEADER, IF SELECTED EARLY ENOUGH DURING PROCUREMENT, WOULD BE FEATURED ON THE FISH EXPO SEMINAR PROGRAM AS A SPEAKER. FAIR AUTHORITIES HAVE INDICATED THEY ARE LOOKING FOR JUST SUCH A SPOKESMAN. SUCH A SPOKESMAN COULD BE EXPECTED TO GENERATE ADDITIONAL INTEREST IN U.S. EQUIPMENT AT FISH EXPO. CONCLUSION: IT IS NOT THE INTENT OF THE RMRO TO ADDRESS QUESTIONS CONCERNING RESOURCES, FREIGHT, DISPLAY, SET UP, ETC, ALTHOUGH THESE MATTERS WOULD CERTAINLY HAVE TO BE REVIEWED TO DETERMINE OVERALL FEASIBILITY OF THE PROPOSAL IN QUESTION. FROM A STRICTLY MARKETING STANDPOINT, HOWEVER, INITIAL REVIEW OF THE FISH-SEAFOOD SECTOR, INDICATES THAT U.S. SUPPLIERS WOULD BENEFIT FROM SOME NEAR TERM PROMOTION/DEMONSTRATION, AND THAT THE CORRESPONDING MARKET EXPOSURE WOULD BE CONSIDERABLE. CONCOMITANTLY, COMMERCIAL SPIN-OFF COULD BE EXPECTED TO ENSUE, PROVIDED THE AMERICAN SUPPLIERS IN QUESTION WERE PREPARED TO FOLLOW-UP SALES LEADS.

TWO YEARS FROM NOW, A PROMOTION OF THE TYPE SUGGESTED MAY BE TOO LATE. FOR ONCE THE 200 MILE LIMIT IS EFFECTED A NUMBER OF UNCLASSIFIED

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AUSTRALIAN JOINT VENTURES WITH FOREIGN FISHING COMPANIES WILL PROBABLY TAKE PLACE; THE RESULT COULD BE THAT AUSTRALIAN END-USERS, WILL RELY MORE UPON EQUIPMENT SUGGESTED BY THEIR NON-U.S. PARTNERS, VIZ, GERMAN, JAPANESE, UK, ETC, WHICH EQUIPMENT, IN TURN, MAY NOT BE AMERICAN SOURCE.

ADDITIONALLY, THE APPRECIATION OF THE YEN, AT PRESENT, APPEARS TO HAVE MADE A CONSIDERABLE DIFFERENCE IN THE THINKING OF SOME POTENTIAL END-USERS WHO HAVE TRADITIONALLY USED JAPANESE EQUIPMENT. FOR EXAMPLE, ONE OF AUSTRALIA'S THREE MAJOR FISHING FLEET BUILDERS INDICATED HE COULD IMMEDIATELY OUTFIT FOUR 80' PRAWN TRAWLERS WITH SOPHISTICATED U.S. ELECTRONIC GEAR PROVIDED HE KNEW WHERE TO CONTACT APPROPRIATE U.S. SUPPLIERS WHO COULD OFFER HIM AN ACCEPTABLE EQUIPMENT AND FINANCE PACKAGE. HIS ATTITUDE IS NOT UNIQUE TO THE MARKET.

FOOTNOTE: THE FOREGOING IS THE INTERIM MARKET SUMMARY REQUIRED BY USDOC AND WILL BE FOLLOWED BY THE RMRO'S FINAL MARKET REPORT, WITH STATISTICAL TABLES, UPON COMPLETION OF INTERVIEWS IN VICTORIA AND NEW SOUTH WALES. POPPLE

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